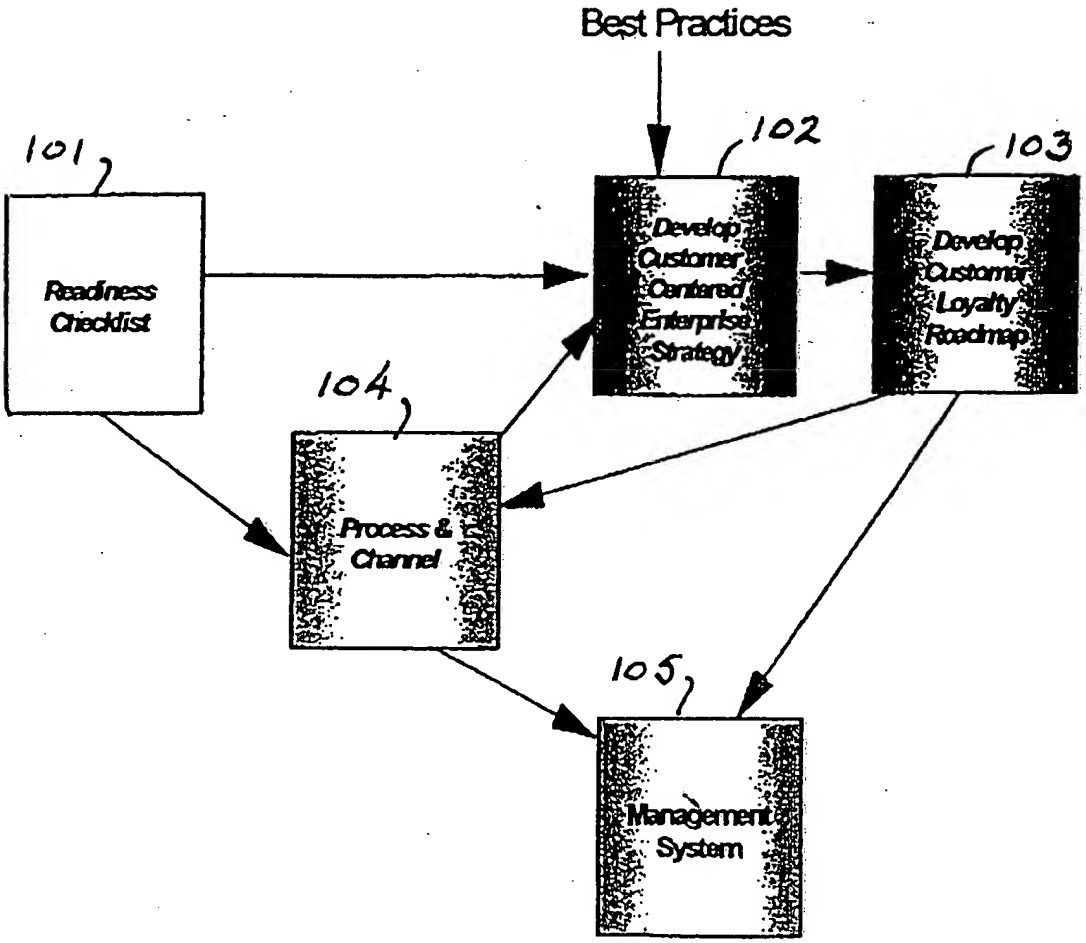

Best Practices
101
Readiness Checklist
102
Develop Customer Centered Enterprise Strategy
103
Develop Customer Loyalty Roadmap
104
Process & Channel
105
Management System

FIG. 1

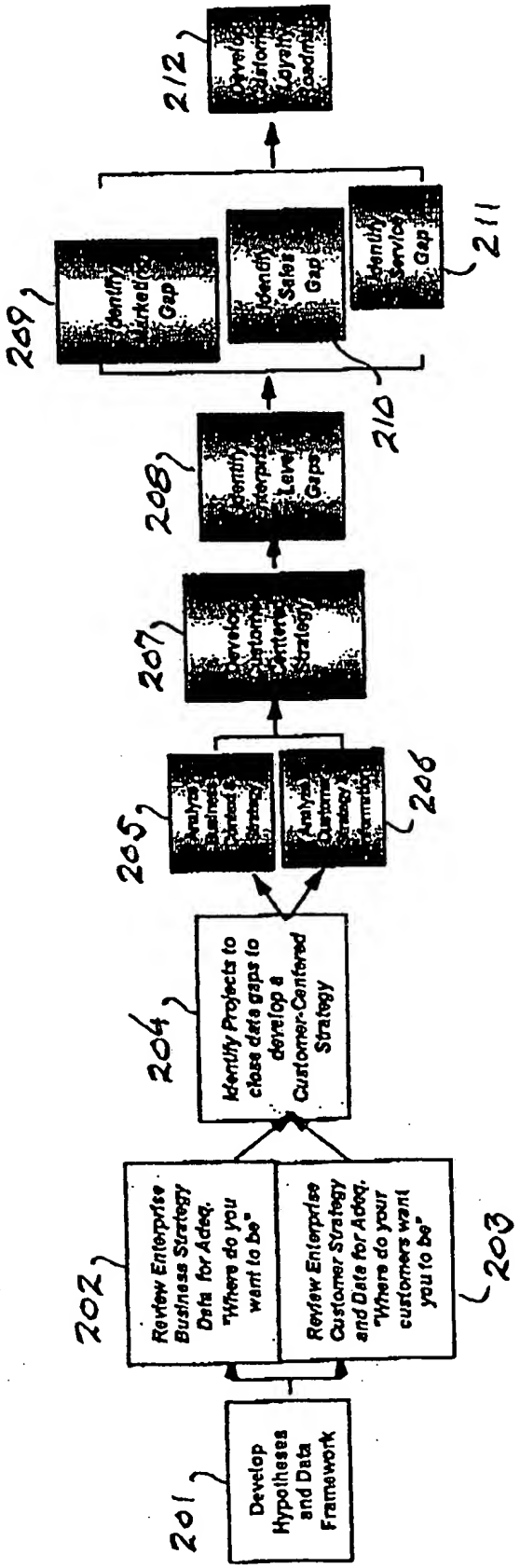

201
Develop Hypotheses and Data Framework
202
Review Enterprise Business Strategy Data for Adeq. "Where do you want to be"
203
Review Enterprise Customer Strategy and Data for Adeq. "Where do your customers want you to be"
204
Identify Projects to close data gaps to develop a Customer-Centered Strategy
205
206
207
208
209
Identify Market Gap
Identify Sales Gap
Identify Service Gap
210
211
212

FIG. 2

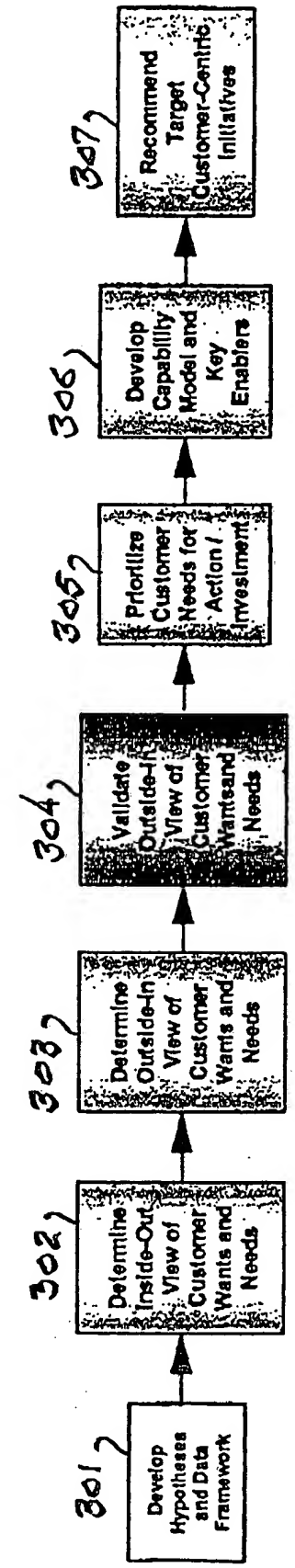

301
Develop Hypotheses and Data Framework
302
Determine Inside-Out View of Customer Wants and Needs
303
Determine Outside-In View of Customer Wants and Needs
304
Validate Outside-In View of Customer Wants and Needs
305
Prioritize Customer Needs for Action / Investment
306
Develop Capability Model and Key Enablers
307
Recommend Target Customer-Centric Initiatives

FIG. 3

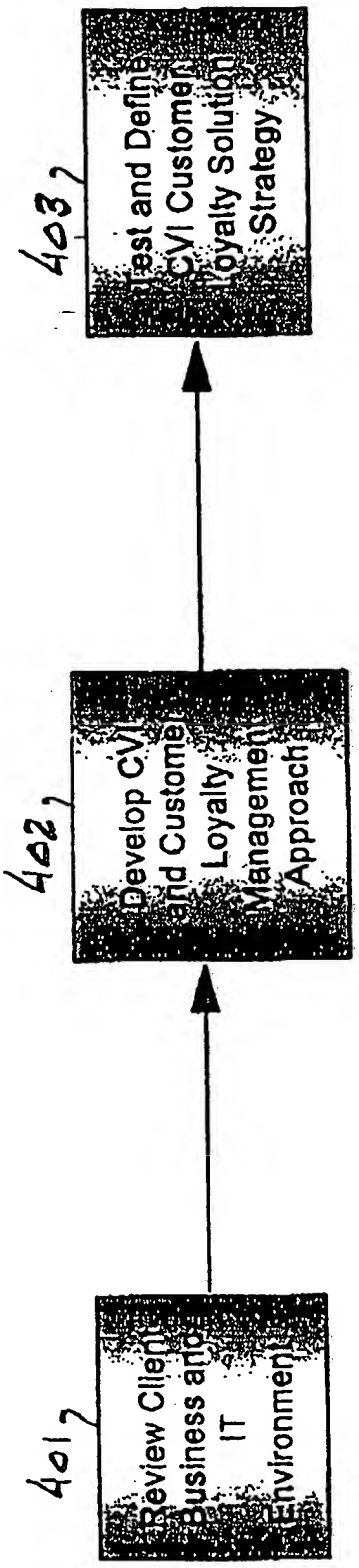

401
Review Client Business and IT Environment
402
Develop CVI and Customer Loyalty Management Approach
403
Test and Define CVI Customer Loyalty Solution Strategy

FIG. 4

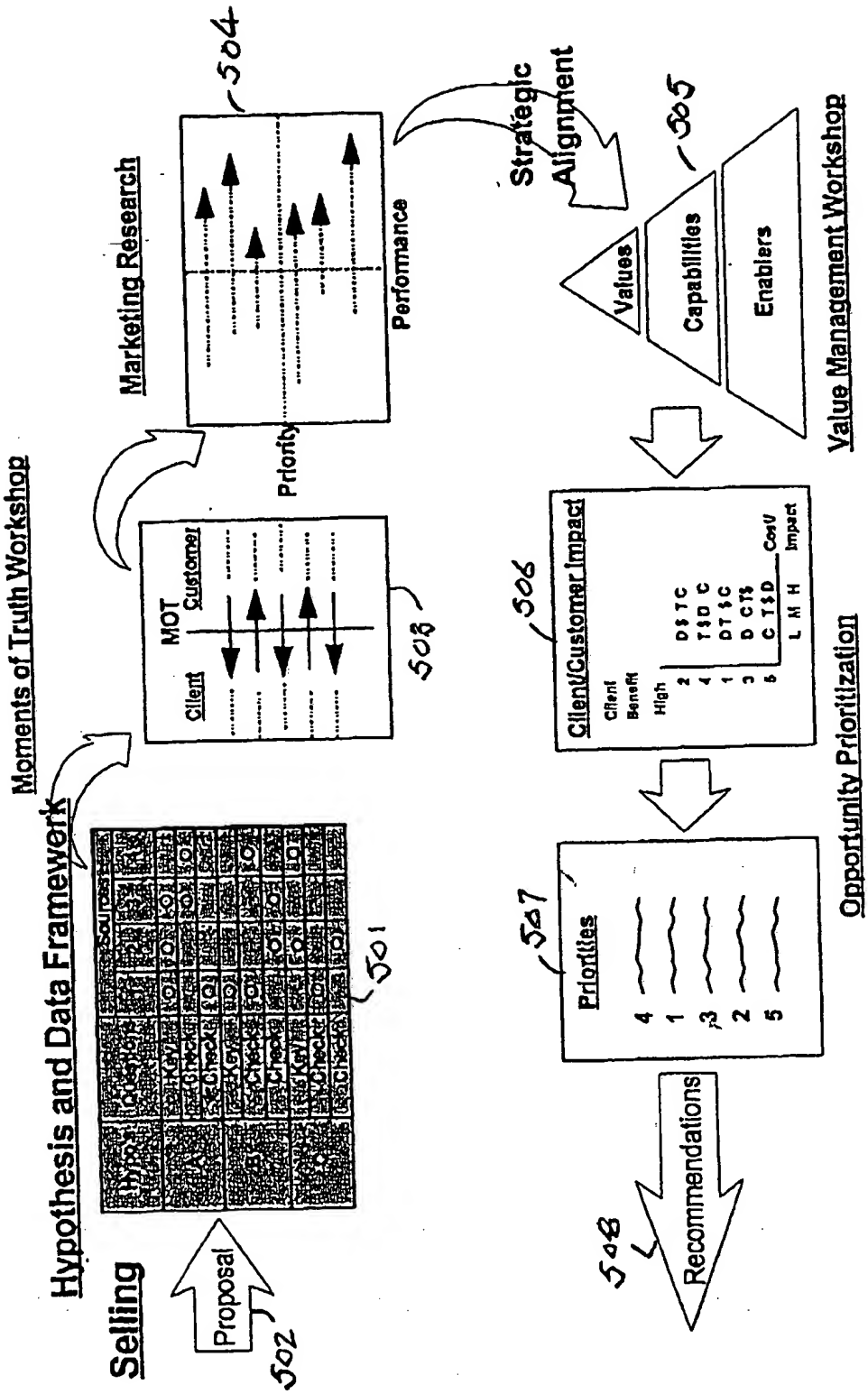
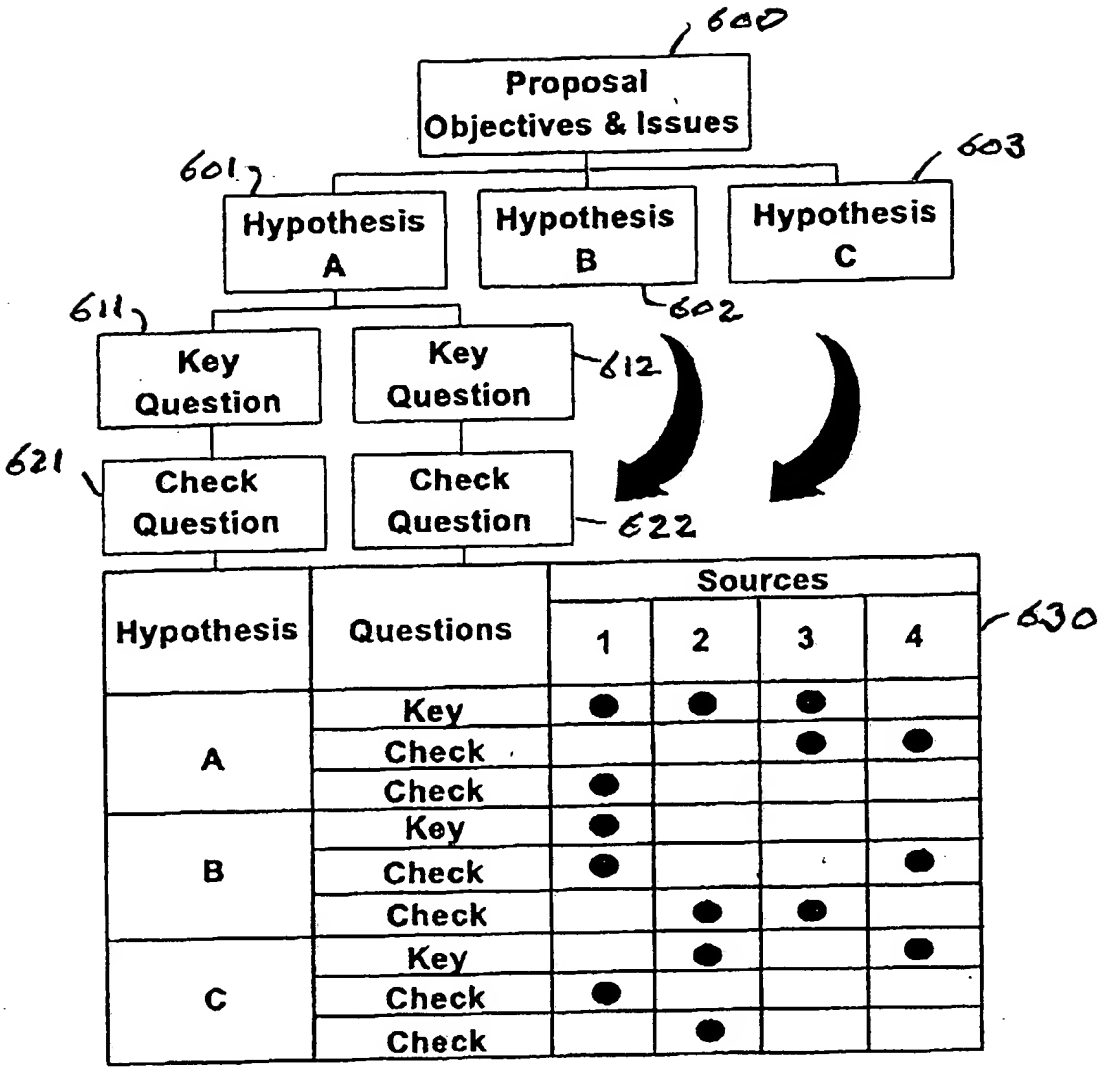

Selling
Proposal
502
Hypothesis and Data Framework
501
Moments of Truth Workshop
MOT
Customer
Client
508
Marketing Research
Priority
Performance
504
Strategic Alignment
Values
Capabilities
Enablers
505
Value Management Workshop
Client/Customer Impact
Client Benefit
High
506
Opportunity Prioritization
Priorities
507
Recommendations
508

FIG. 5



Hypothesis	Questions	Sources 1	2	3	4
A	Key	●	●	●	
	Check			●	●
	Check	●			
B	Key	●			
	Check	●			●
	Check		●	●	
C	Key		●		●
	Check	●			
	Check		●		

630

FIG. 6

701

Identify the objectives & issues

Utilize the proposal,supplemented by interviews with key client executives and stakeholders

702

Develop the hypotheses

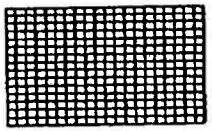
Working with team, for each objective, develop statements (hypothesis) which when proven or refuted would support or achieve the objective

703

...and questions/check questions

Next, develop questions (primary) and check questions (secondary) that focus on collecting relevant facts & findings to derive the conclusions to support the objectives

Create the matrix of data sources



Utilizing a matrix, identify the data sources that must be used to collect relevant facts and findings,correlated to the data collection method that will be used

704

...and documentation formats

705

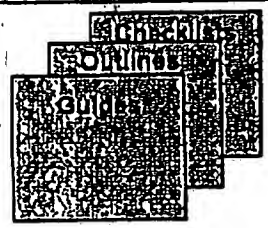


FIG.7

Issues / Hypotheses / Questions / Data Sources	Data Framework				
		Sources, i.e.:			
Hypos	Questions	Reports & Documents	Executive Interviews	Existing Research	Other
ABC Co. has a mission, vision, and strategy which are easily understood and widely known.	• How is business strategy established and communicated? What are the mission, vision, goals & objectives?				
Business decisions, goals and objectives are based upon these and are focused upon market segments.	• How are decisions made regarding which market opportunities to pursue?				
	• How do current strategies and programs map to the target markets' needs/wants/values?				
Highest value/leverage market segments are identified & targeted.	• What key market segments are identified?				
	• How are segments determined? I.E.: Value to ABC Co.? Common needs/buying behavior?				
	• Who are the targeted high value customers/ segments? (Current and future)				

FIG. 8A

Issues / Hypotheses / Questions / Data Sources	Data Framework	Sources, i.e.:			
Hypos	Questions?	Client Interviews/ Workshops	Customer Complaint Records	Existing Research/ Surveys	Add'l Research, ie: -Cust. Interviews -Focus Groups -Surveys
Moments of Truth (Value) are identified and understood	• What are MOT interactions within the project scope?				
	• Which are the MOTs that can be leveraged to deliver & compete-on value to the customer?				
	• Who receives value at each MOT?				
	• "Whose" opinion (by segment) is important regarding each MOT? I.e.: Who is at the point of interaction (user)? Who makes the buying decision (approver)? Who influences the decision (reviewers or influencers)?				
Needs/Wants are known by MOT & segment (Customer Vision)	• What are ***Basic*** needs (not met= drive attrition)?				
	• What are ***Attractors*** (if met= drive share)?				
	• What are ***Satisfiers*** (which drive satisfaction, ~~but *individually* do not affect behavior~~)?				

FIG. 8B

Issues / Hypotheses / Questions / Data Sources	Data Framework	Sources, I.e.:			
Hypos	Questions	Client Interviews/ Workshops	Customer Complaint Records	Existing Research/ Surveys	Add'l Research, Ie: -Cust. Interviews -Focus Groups -Surveys
Customer priorities & performance perceptions are known (by segment)	• What is customer-perceived client performance of each "need"?				
	• What is ABC Co. performance gap with competition?				
	• What attributes differentiate the "best" competitor in the customer's mind?				
	• What are customers "need" priorities (rank/weight)?				
ABC Co. performance improvement priorities are established	• What are client improvement priorities? (I.E.: Highly important needs with poor performance or gaps).				
	• Which ***Basic needs*** lag minimum customer expectation (or the avg industry performance)?				
	• Which ***Attractors*** lag best competition (or have little/no competitive performance)?				
	• Which ***Satisfiers*** lag average industry performance?				

FIG. 8C

Issues / Hypotheses / Questions / Data Sources	Data Framework				
Hypos	Questions	Sources, i.e.: Cross-functional Workshops	Client Interviews/ Surveys	Secondary Research/ Literature Scan	Primary Research/ Benchmarking
Necessary ABC Co. process Capabilities are present	• What process Capabilities must be present (to meet/deliver targeted customer needs)?				
	• What Capabilities distinguish BOB (in client industry) and worldclass (any industry) companies?				
	• What is current level/presence of these (H/M/L)? (identifies client capability gap to be closed)				
Required ABC Co. Infrastructure Enablers are present	• Which capabilities are assessed as "zero", "low" or "medium" level of presence (versus high or ideal)?*				
	• What are the/their required Infrastructure Enablers?				
	• What Enablers also distinguish BOB/WC co's?				
	• What is current presence (H/M/L/0) of above enablers?				

* Note: When doing process improvement, analyze only the poor performing (M/L/O) capabilities... but, when reengineering a new process design, also include the high performing capabilities (as they must also be enabled in the new design).

FIG. 8D

Issues / Hypotheses / Questions / Data Sources	Data Framework				
		Sources, i.e.:			
Hypos	Questions	Cross-functional Workshops	Finance Org. for Sizing	IT Org. for Sizing	Executive Interviews/ Workshops
Customer-defined infrastructure improvements/ investments are identified and prioritized	• Which are the current M/L/O Enablers?				
	• How do they cluster into logical projects, i.e.: ▸ A cluster of similar Enablers, such as several business practice changes, or ▸ A group of Enablers to deliver a Capability				
	• What is the relative cost vs business benefit of the different potential projects?				
	• What are the prioritized recommended actions? (for highest customer value and client benefit?)				

FIG. 8E

Issues / Hypotheses / Questions / Data Sources	Data Framework				
		Sources, i.e.:			
Hypos	Questions	Review Reports/ Process	Executive Interviews	Other	
An on-going process is in place to use customer value to drive business decisions	• How are customer Needs/Wants/Values identified?				
	• How do customer value and performance perception drive investments and resource allocation? ▸ What is the management decision system? ▸ How are investment priorities determined? ▸ Is customer-feedback an action "driver"?				
	• What is the closed-loop satisfaction process? ▸ Are implemented improvement actions surveyed to determine customer impact? ▸ How are new/emerging customer needs ID'd? ▸ Are competitive perceptions monitored? ▸ Are complaints analyzed for trends? ▸ Are customer service requests analyzed? ▸ How are the above looped back into the management system to adjust infrastructure?				

FIG. 8F

Hypotheses	Key Questions	Sources			
		Existing Data	Interviews	Focus Groups	Surveys
Customer Needs & Wants Are Known	How does Greenback determine customer requirements?	Not Current	Ad hoc	Needed	Needed
	What customer requirements data exists?	Not Available	Not Current	Needed	Needed
	How does Greenback determine customer performance perceptions and satisfaction?	Not Available		Needed	Needed
Other Hypos	What data exists? Who ~~and how is it used?~~	Not Available		Needed	Needed

FIG. 9

Hypothesis	Key Questions	Sources			
		Existing Data	Inter-views	Focus Groups	Survey
Customer Needs & Wants Are Known	How does Greenback determine customer requirements?	Not Current	Ad hoc	Needed	Needed
	What customer requirements data exists?	Not Available	Not Cu		
	How does Greenback determine customer performance perceptions and satisfaction?	Not Available		Needed	
	What data exists? Who and how is it used?	Not Available		Needed	
Others					

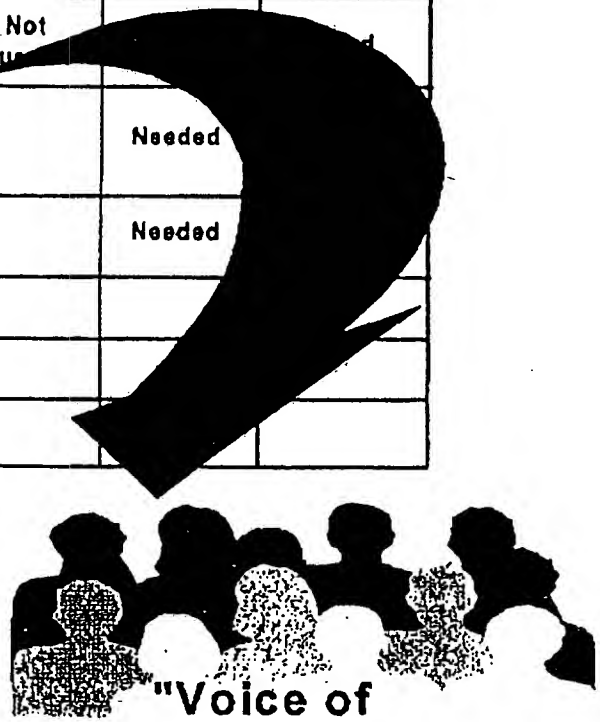


FIG. 10